Alberta Tourism Market Monitor

Monthly Update

September 2010

Accommodation Indices

For the first seven months of 2010, the occupancy rate for Alberta (excluding resorts) was 57.4%, down –2.3 points compared to the first seven months of 2009 (59.7%). The average daily room rate for Alberta (excluding resorts) for the first seven months of 2010 was $126.62, down –2.7% compared to the same time period in 2009 ($130.17).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Edmonton Occupancy Rate	50.6%	59.0%	65.9%	64.8%	60.5%	62.2%	**62.7%**						**60.8%**
Point Change from 2009	-6.2	-12.0	-2.7	-4.8	-4.5	-3.6	**-2.7**						**-5.3**
Average Daily Room Rate	$120.37	$119.92	$119.37	$120.66	$121.21	$120.56	**$114.29**						**$119.47**
Variance from 2009	-1.4%	-2.2%	-2.3%	-1.8%	-1.2%	0.7%	**-1.6%**						**-1.5%**
Calgary Occupancy Rate	51.4%	56.8%	62.0%	64.0%	64.8%	71.9%	**74.5%**						**63.5%**
Point Change from 2009	-3.2	-6.7	-2.9	2.7	-0.4	3.5	**-1.1**						**-1.4**
Average Daily Room Rate	$134.03	$138.67	$137.87	$139.29	$144.96	$161.50	**$159.61**						**$146.34**
Variance from 2009	-5.4%	-3.1%	-3.3%	-0.3%	1.6%	9.6%	**-0.5%**						**0.3%**
Alberta Resorts Occupancy Rate	35.6%	45.1%	46.7%	45.3%	52.8%	66.6%	**75.3%**						**52.6%**
Point Change from 2009	-4.3	-7.0	0.3	2.3	-1.7	8.3	**3.0**						**0.1**
Average Daily Room Rate	$150.56	$156.68	$157.57	$150.24	$168.33	$219.80	**$229.65**						**$183.83**
Variance from 2009	-3.9%	-2.4%	-2.6%	1.8%	-8.8%	-3.2%	**2.9%**						**-1.3%**
Other Alberta * Occupancy Rate	42.4%	48.6%	52.2%	45.4%	47.0%	56.0%	**58.2%**						**50.1%**
Point Change from 2009	-7.8	-4.5	-0.2	0.1	-1.3	3.9	**5.8**						**-0.3**
Average Daily Room Rate	$114.94	$114.29	$116.50	$113.28	$111.52	$114.72	**$114.20**						**$114.07**
Variance from 2009	-9.7%	-9.5%	-6.4%	-6.4%	-7.7%	-3.8%	**-5.5%**						**-7.0%**
Total Alberta (excluding Resorts) Occupancy Rate	47.6%	54.2%	59.3%	56.9%	56.6%	62.7%	**64.4%**						**57.4%**
Point Change from 2009	-6.0	-7.7	-2.0	-0.8	-2.1	1.3	**0.8**						**-2.3**
Average Daily Room Rate	$123.02	$123.83	$124.20	$124.61	$126.50	$132.72	**$129.96**						**$126.62**
Variance from 2009	-5.4%	-5.1%	-4.3%	-2.6%	-2.0%	2.6%	**-3.2%**						**-2.7%**

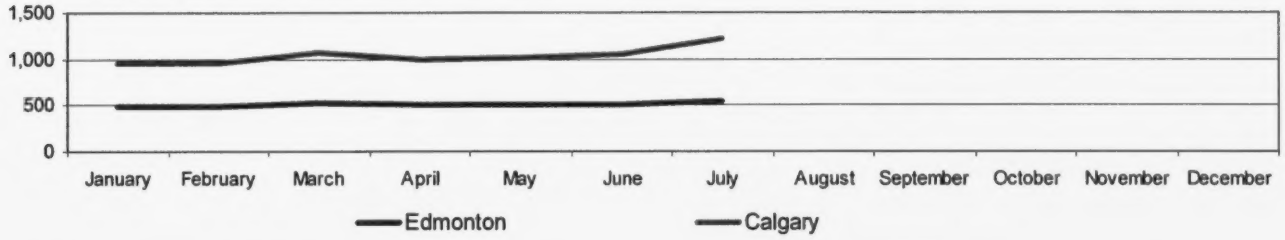
* Includes Lethbridge, Red Deer and other Alberta communities

Source: PKF Consulting Inc.

Air Passengers (enplanements and deplanements)

Edmonton International Airport reported that in July 2010, 546,102 passengers either boarded or deplaned at the airport, an increase of +1.6%, compared to July 2009. For year-to-date 2010, 3.56 million passengers either boarded or deplaned at the airport, an increase of +0.3%, compared to the same time period in 2009. Calgary International Airport reported that in July 2010, 1,209,982 passengers either boarded or deplaned at the airport, an increase of +5.1%, compared to July 2009. For year-to-date, 7.25 million passengers either boarded or deplaned at the airport, an increase of +3.3%, compared to the same time period in 2009.

Air Passengers ('000s of enplanements and deplanements) 2010



Source: Edmonton International Airport and Calgary Airport Authority.

Highway Traffic Count ('000s of Vehicles) 2010

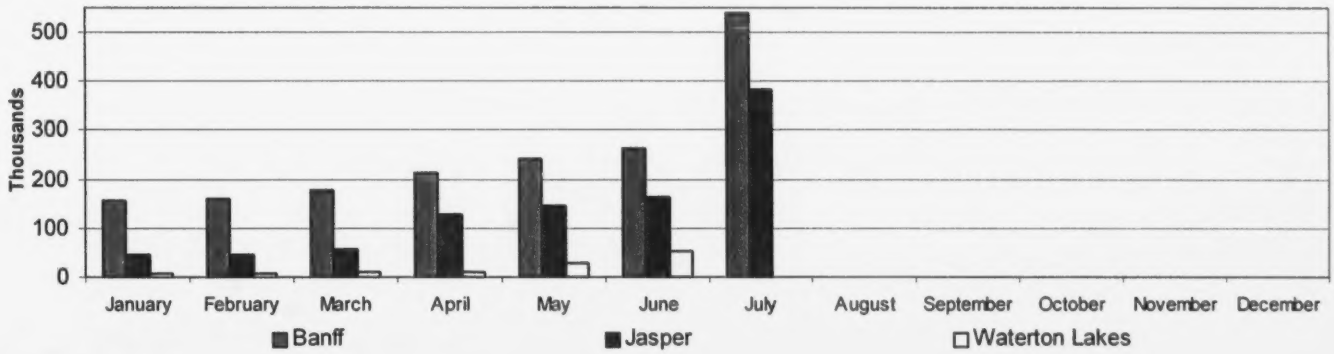
Preliminary	Hwy 1—Sask border w-bound	% Change from 2009	Hwy 1—Banff Pk Gate (2 way)	% Change from 2009	Hwy 16– Jasper Pk Gate (2 way)	% Change from 2009	Hwy 16—Jct #897 w-bound	% Change from 2009
January	55.0	5.0%	420.7	4.7%	81.8	4.1%	142.4	2.7%
February	55.3	5.5%	414.4	0.6%	82.6	7.0%	133.3	2.2%
March	62.7	7.7%	462.3	8.3%	101.5	14.4%	154.8	9.0%
April	70.5	4.1%	472.7	1.7%	109.4	8.1%	161.9	1.3%
May	73.6	2.2%	527.8	-2.9%	122.1	3.2%	170.7	3.8%
June	**77.0**	**0.1%**	**547.9**	**0.6%**	**136.9**	**3.1%**	**175.9**	**4.6%**
July	**103.9**	**-1.5%**	**804.0**	**5.0%**	**217.1**	**6.3%**	**192.0**	**4.5%**
August								
September								
October								
November								
December								
Year-To-Date	**498.0**	**2.7%**	**3,649.8**	**2.5%**	**851.4**	**6.3%**	**1,131.1**	**4.0%**

Source: Alberta Transportation.

National Park Attendance ('000s of person visits)

Independent visits to Banff National Park for July 2010 are up +3.2% to 540,030 visitors compared to July 2009 (523,111). Year-to-date independent visits to Banff National Park are up +2.2% to 1,729,322 visitors, compared to 2009 (1,711,624). Independent visits to Jasper National Park for July 2010 are up +4.3% to 383,118 visitors compared to July 2009 (367,232). Year-to-date independent visits to Jasper National Park are up +4.2% to 972,154, compared to 2009 (933,136).

Independent Visits to National Parks - 2010



Source: Parks Canada.

Historic Sites and Museums ('000s of person visits)

2010 Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	25.2	41.5	47.3	48.0	76.3	101.8							340.1
% Change from 2009	12.5%	-12.6%	1.3%	-6.1%	0.0%	-8.2%							-4.2%

Source: Alberta Culture and Community Spirit, Historic Resources Division. **No new updates in September.**

Employment ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta decreased –6.5% in August 2010, compared to August 2009. For the first eight months of 2010, employment in the Accommodation, Food and Beverage sector in Alberta was up +0.7%, compared to the first eight months of 2009.

Preliminary Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	131.8	130.3	133.4	129.0	127.7	122.6	122.0	**121.9**					**127.3**
% Change from 2009	8.3%	4.2%	8.2%	0.5%	1.2%	-6.1%	-4.0%	**-6.5%**					**0.7%**

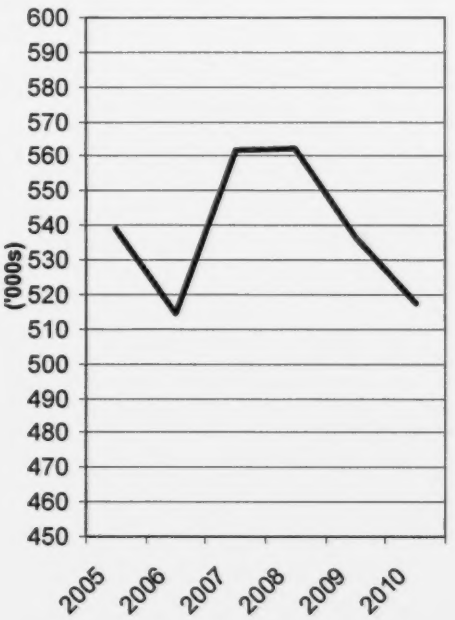
Source: Statistics Canada, Labour Force Survey.

Direct international entries into Alberta and Canada (Preliminary) - July 2010

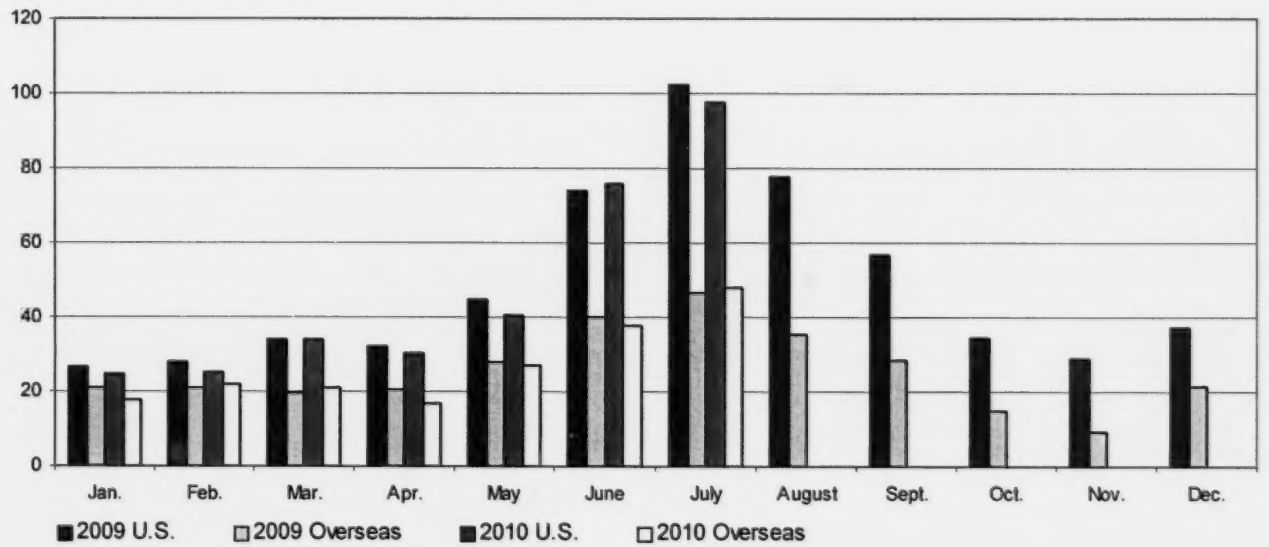
Alberta direct entries include all residents of the United States and overseas countries that enter Canada at a Canada Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e. enter Canada via another province and then travel into Alberta).

- For the first seven months of 2010, Alberta's overnight direct entries by international visitors (U.S. and overseas) decreased –3.5%, compared to the first seven months of 2009. For Canada as a whole, the increase was +1.3%.
- Overnight total (auto and non-auto) direct entries for the first seven months of 2010 from the U.S. to Alberta decreased –3.9%, compared to the first seven months of 2009. Nationally, the decline was –0.3%.
- For the first seven months of 2010, overnight direct entries by overseas visitors into Alberta decreased –2.8%, compared to the first seven months of 2009. Nationally, the increase was +5.2%.
- For the first seven months of 2010, overnight visitors from the United Kingdom to Canada decreased –0.5% compared to 2009. Overnight visitors from Germany increased +8.3%, visitors from Mexico decreased –39.4% and Japanese visitors increased +28.2%.

Direct Overnight International (Overseas and U.S.) Entries into Alberta, January - July



Direct Overnight U.S. and Overseas Entries into Alberta ('000s)



Source: Statistics Canada, International Travel: Advance Information

Food Services and Drinking Places ($millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's total receipts for the month of June were up +3.8% to $573.5 million, compared to 2009 ($552.6 million).

Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	$551.3	$547.7	$569.0	$558.7	$569.3	**$573.5**							**$561.6**
% Change from 2009	0.2%	-1.0%	4.1%	2.1%	2.6%	**3.8%**							**1.7%**

Source: Statistics Canada, Food Services and Drinking Places

Definitions of Indicators

Direct International Entries into Canada and Alberta - Alberta direct entries include all residents of the United States and overseas countries that enter Canada at a Canada Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e. enter Canada via another province and then travel into Alberta). Source: Statistics Canada, Preliminary Advance Information, International Travel, catalogue 66-001-P.

Air Passengers - Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic - These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year-to-date is a cumulative total for all vehicles. Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

Accommodation Indices— Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc., Trends in the Canadian Hotel Industry.

Historic Sites and Museums— Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture and Community Spirit, Historic Resources Division.

National Park Attendance— Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Tour group data are included in the annual total only. Source: Parks Canada.

Employment in the Food and Accommodation Sector— The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places— The monthly survey provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population includes full-service restaurants, limited service eating places, special food places and drinking places. Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

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2010 Alberta Tourism Market Monitor

Alberta Tourism, Parks and Recreation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Entries into CANADA by Country of Residence (000's of trips)[1]													
United States*	446.8r	537.8r	582.2r	683.1p	962.7p	1,405.9p	**2,018.6p**						**6,630.5p**
Per cent change from 2009	-7.9%	1.1%	0.8%	-4.8%	-9.2%	3.6%	**5.2%**						**-0.3%**
Other International (n/incl US)*	195.9r	218.2r	235.1r	263.6p	387.6p	523.5p	**645.2p**						**2,466.5p**
Per cent change from 2009	-6.8%	6.5%	11.2%	-4.8%	7.4%	11.3%	**7.4%**						**5.7%**
United Kingdom	32.6p	35.1p	41.5p	45.3p	69.0p	88.1p	**98.8p**						**410.5p**
Per cent change from 2009	-4.2%	-8.6%	12.0%	-12.0%	1.2%	1.9%	**2.1%**						**-0.5%**
Germany	12.2p	14.0p	16.2p	19.6p	33.9p	40.6p	**48.0p**						**184.6p**
Per cent change from 2009	-7.9%	9.1%	26.4%	14.9%	8.2%	9.3%	**4.4%**						**8.3%**
Japan	8.9p	13.1p	16.7p	14.9p	18.7	27.1p	**28.5p**						**128.0p**
Per cent change from 2009	5.5%	10.6%	6.9%	3.8%	44.6%	82.5%	**31.0%**						**28.2%**
Alberta Direct Entries (000's of trips)[2]													
U.S. Residents	24.7p	24.9p	34.0p	30.1p	40.5p	75.7p	**97.9p**						**327.8p**
Per cent change from 2009	-8.0%	-10.4%	0.7%	-6.3%	-8.6%	2.3%	**-4.3%**						**-3.9%**
Other Countries	17.5p	21.7p	21.0p	16.6p	27.2p	37.6p	**48.1p**						**189.8p**
Per cent change from 2009	-15.5%	4.9%	8.0%	-18.4%	-2.2%	-5.4%	**3.3%**						**-2.8%**
Air Passengers (000's of enplanements and deplanements)[3]													
Edmonton International	486.5p	478.8p	533.2r	506.1r	506.6r	499.7r	**546.1p**						**3,557.0p**
Per cent change from 2009	-1.4%	-2.7%	1.2%	-3.8%	3.7%	3.8%	**1.6%**						**0.3%**
Calgary International	954.4p	948.6r	1,065.2r	1,002.5r	1,020.9r	**1,052.2p**	**1,210.0p**						**7,253.7p**
Per cent change from 2009	1.7%	0.5%	3.8%	-0.7%	6.4%	**6.1%**	**5.1%**						**3.3%**
Highway Count 2010 (000's of vehicles)[4]													
Hwy 1 -Sask border w-bound	55.0p	55.3p	62.7p	70.5p	73.6p	**77.0p**	**103.9p**						**498.0p**
Per cent change from 2009	5.0%	5.5%	7.7%	4.1%	2.2%	**0.1%**	**-1.5%**						**2.7%**
Hwy 1 - Banff Pk Gate (2-way)	420.7p	414.4p	462.3p	472.7p	527.8p	**547.9p**	**804.0p**						**3,649.8p**
Per cent change from 2009	4.7%	0.6%	8.3%	1.7%	-2.9%	**0.6%**	**5.0%**						**2.5%**
Hwy 16 - Jasper Pk Gate (2 way)	81.8p	82.6p	101.5p	109.4p	122.1p	**136.9p**	**217.1p**						**851.4p**
Per cent change from 2009	4.1%	7.0%	14.4%	8.1%	3.2%	**3.1%**	**6.3%**						**6.3%**
Hwy 16 - Jct #897 w-bound	142.4p	133.3p	154.8p	161.9p	170.7p	**175.9p**	**192.0p**						**1,131.1p**
Per cent change from 2009	2.7%	2.2%	9.0%	1.3%	3.8%	**4.6%**	**4.5%**						**4.0%**

Sources: Statistics Canada, Edmonton International Airport, Calgary International Airport, Alberta Transportation

*** The data for Canada for 2010 has been revised to exclude same-day entries into Canada by U.S. and other international visitors. Individual Country data includes entries into Canada through the United States.**

p=preliminary r=revised e=estimate

New or updated monthly figures are shown in bold type

2010 Alberta Tourism Market Monitor

Alberta Tourism, Parks and Recreation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices [5]													
Edmonton Occupancy Rate	50.6%	59.0%	65.9%	64.8%	60.5%	62.2%	**62.7%**						**60.8%**
Point change from 2009	-6.2	-12.0	-2.7	-4.8	-4.5	-3.6	**-2.7**						**-5.3**
Average Daily Room Rate	$120.37	$119.92	$ 119.37	$120.66	$ 121.21	$ 120.56	**$114.29**						**$119.47**
Calgary Occupancy Rate	51.4%	56.8%	62.0%	64.0%	64.8%	71.9%	**74.5%**						**63.5%**
Point change from 2009	-3.2	-6.7	-2.9	2.7	-0.4	3.5	**-1.1**						**-1.4**
Average Daily Room Rate	$134.03	$138.67	$ 137.87	$139.29	$ 144.96	$ 161.50	**$159.61**						**$146.34**
Alberta Resorts Occupancy Rate	35.6%	45.1%	46.7%	45.3%	52.8%	66.6%	**75.3%**						**52.6%**
Point change from 2009	-4.3	-7.0	0.3	2.3	-1.7	8.3	**3.0**						**0.1**
Average Daily Room Rate	$150.56	$156.68	$ 157.57	$150.24	$ 168.33	$ 219.80	**$229.65**						**$183.83**
Total Alberta (excluding Resorts) Occupancy Rate	47.6%	54.2%	59.3%	56.9%	56.6%	62.7%	**64.4%**						**57.4%**
Point change from 2009	-6.0	-7.7	-2.0	-0.8	-2.1	1.3	**0.8**						**-2.3**
Average Daily Room Rate	$123.02	$123.83	$ 124.20	$124.61	$ 126.50	$ 132.72	**$ 129.96**						**$126.62**
National Park Attendance (000's of person visits) 2010 [6] Does not include Group Tours.													
Banff	155.2p	158.1p	178.5p	213.9p	240.1p	**263.4p**	**540.0p**						**1,749.2p**
Per cent change from 2009	3.1%	-0.3%	8.1%	2.1%	-1.8%	**1.3%**	**3.2%**						**2.2%**
Jasper	44.8p	47.3p	57.8p	128.6p	145.6p	**165.0p**	**383.1p**						**972.2p**
Per cent change from 2009	3.9%	6.1%	14.7%	5.4%	0.6%	**2.5%**	**4.3%**						**4.2%**
Waterton Lakes	6.6p	7.3p	9.2p	12.0p	27.3p	54.8p							117.3p
Per cent change from 2009	-8.3%	-3.9%	16.5%	4.3%	-10.5%	2.6%							-0.7%
Employment (000's of persons) Seasonally Adjusted [7]													
Accommodation, Food & Beverage	131.8	130.3	133.4	129.0	127.7	122.6	122.0	**121.9p**					**127.3p**
Per cent change from 2009	8.3%	4.2%	8.2%	0.5%	1.2%	-6.1%	-4.0%	**-6.5%**					**0.7%**
Food Services and Drinking Places ($Millions) unadjusted [8]													
Total Receipts for Alberta	$551.3r	$547.7r	$569.0r	$558.7r	$569.3r	**$573.5p**							**$561.6p**
Per cent change from 2009	0.2%	-1.0%	4.1%	2.1%	2.6%	**3.8%**							**1.7%**
Historic Sites and Museums 2010 (000s of person visits) [9]													
Visitor Attendance	25.2p	41.5p	47.3p	48.0p	76.3p	101.8p							**340.1p**
Per cent change from 2009	12.5%	-12.6%	1.3%	-6.1%	0.0%	-8.2%							**-4.2%**
Sources: PKF Consulting Inc., Statistics Canada, Parks Canada, Alberta Culture and Community Spirit													

New or updated monthly figures are shown in bold type

p=preliminary r=revised e=estimate

21-Sep-10

1. Entries into Canada by Country of Residence – Includes all residents of the United States and other countries who enter Canada at a Canada Border Services Agency land port or airport. Starting in January 2010, direct entries into Canada include only those visitors that stayed at least one night in Canada.
Source: Statistics Canada catalogue 66-001(p) International Travel – Advance Information (monthly)

2. Alberta Direct Entries – Alberta direct entries include all residents of the United States and other countries that enter Canada at a Canadian Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e. enter Canada via another province and then travel into Alberta).
Source: Statistics Canada catalogue 66-001(p) International Travel – Advance Information (monthly)

3. Air Passengers – Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport and Calgary International Airport Websites

4. Highway Traffic: These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the dierction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

5. Accommodation Indices – Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.
Source: Trends in the Canadian Hotel Industry, produced by PKF Consulting Inc.

6. National Park Attendance -- Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total.
Source: Parks Canada

7. Employment Food and Accommodation Sector – The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey.
Source: Statistics Canada, Labour Force Survey

8. Food Services and Drinking Places -- The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places.
Source: Statistics Canada, Food Services and Drinking Places

9. Historic Sites and Museums -- Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.
Source: Alberta Culture and Community Spirit, Historic Resources Division

21-Sep-10